



ERNEST ORLANDO LAWRENCE
BERKELEY NATIONAL LABORATORY



INFORMATION TECHNOLOGY
DIVISION

BLI: eRoom Advanced Part 2 Databases

Curtis McDonald

Information Technology Division

Agenda



- **Canned database**
 - **Exercise #1**
- **Freeform database**
 - **Exercise #2**
- **Database import/export**
 - **Exercise #3**
- **Enterprise database**



INFORMATION TECHNOLOGY
DIVISION

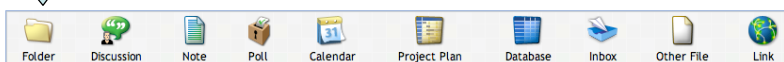
Getting started



- **Login to eRoom**
 - <http://www.lbl.gov/eroom>
- **Navigate to the BLI Advanced Class eRoom**
- **Choose create/folder**

Create

What type of item would you like to create?



- **Create a folder named your first name e.g. Sue**



INFORMATION TECHNOLOGY
DIVISION

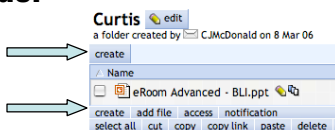
3

Canned database



- **Go into your folder**

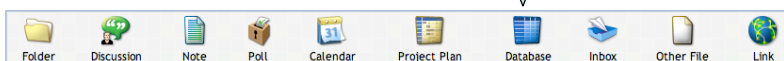
- **Choose create**



- **Select database**

Create

What type of item would you like to create?



INFORMATION TECHNOLOGY
DIVISION

4

Canned database



- The following options are shown.
- Choose document library
Database Type

What kind of database do you want to create?

☐ Ask the Expert

☐ Contact List

☒ Document Library

☐ Issues (approval process)

☐ Issues Tracking (enterprise)

☐ Milestones

☐ Research Resources

☐ RFP Process (approval process)

☐ T&E Processing (approval process)

☐ Tasks

☐ URL Links

☐ (blank)



☐ create an enterprise overview enterprise databases only

5

Document Library Database



- Enter a name (use default)
- Choose a color scheme
- Click next

Set Database Name

Pick a name for this database.

Document Library

☐ This database is a multi-step approval process.

Pick a color scheme for this database

☐ City Zip ☒ City Zip ☐ City Zip ☐ City Zip

☐ Go through all database options now.

[access control](#) [change icon](#) [custom commands](#)

- Document library database is created



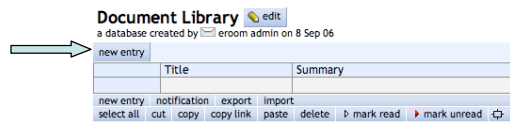
INFORMATION TECHNOLOGY
DIVISION

6

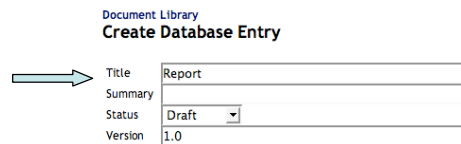
Document Library Database



- Create a new entry in your document library



- Enter data to be included in entry



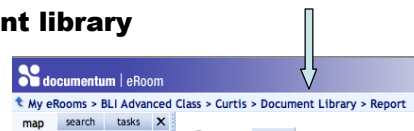
INFORMATION TECHNOLOGY
DIVISION

7

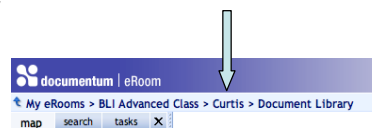
Using Breadcrumbs



- Navigate back to document library



- Notice the entry you have created
- Navigate back to your folder



INFORMATION TECHNOLOGY
DIVISION

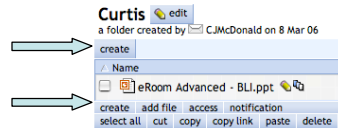
8

Canned database #2



- Go into your folder

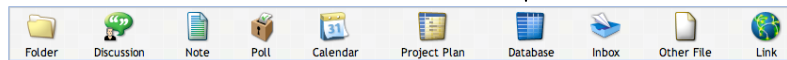
- Choose create



- Select database

Create

What type of item would you like to create?



INFORMATION TECHNOLOGY
DIVISION

9

Canned database



- The following options are shown.

- Choose contact list

Database Type

What kind of database do you want to create?

- ☐ Ask the Expert
- ☒ Contact List
- ☐ Document Library
- ☐ Issues (approval process)
- ☐ Issues Tracking (enterprise)
- ☐ Milestones
- ☐ Research Resources
- ☐ RFP Process (approval process)
- ☐ T&E Processing (approval process)
- ☐ Tasks
- ☐ URL Links
- ☐ (blank)



☐ create an enterprise overview enterprise databases only

10

Contact List Database



- Enter a name (use default)
- Choose a color scheme
- Click next

Next Previous Cancel

Set Database Name

Pick a name for this database.

☐ This database is a multi-step approval process.

Pick a color scheme for this database

☐ City Zip ☒ City Zip ☐ City Zip ☐ City Zip
 Cambridge 02138 Cambridge 02138 Cambridge 02138 Cambridge 02138

☐ Go through all database options now.

- Data base is created



INFORMATION TECHNOLOGY
DIVISION

11

Contact List Database



- Create first contact list entry



Contact List
 a database created by eroom admin on 8 Sep 06

Maintain the contact information for all the current members of the project team.

Name	Email	Role	Organization
Group by: (none)			
<input type="button" value="new entry"/> <input type="button" value="notification"/> <input type="button" value="export"/> <input type="button" value="import"/>			
<input type="button" value="select all"/> <input type="button" value="cut"/> <input type="button" value="copy"/> <input type="button" value="copy link"/> <input type="button" value="paste"/> <input type="button" value="delete"/> <input type="button" value="mark read"/> <input type="button" value="mark unread"/>			

OK Add Another Cancel

- Enter your contact information



Contact List
Create Database Entry

Name

Email

Role

Responsibility

Organization

Phone

Cell



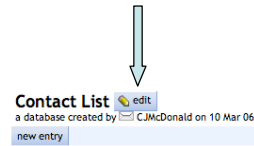
INFORMATION TECHNOLOGY
DIVISION

12

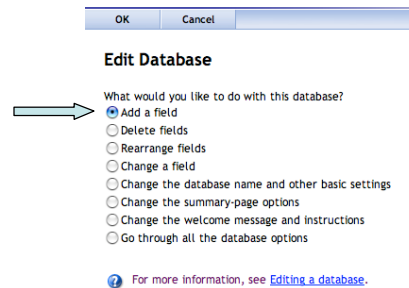
Contact List Database (Modify)



- Navigate back to the database root
- Select edit button



- The following options are available
- Select add a field



INFORMATION TECHNOLOGY
DIVISION

13

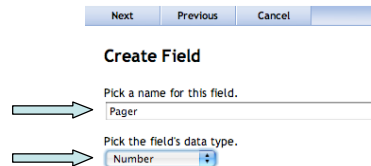
Contact List Database (Modify)



- Choose the field order
- This new field should appear after the cell field
- Click next



- Enter field name: pager
- Select the field data type
- Click next



INFORMATION TECHNOLOGY
DIVISION

14

Contact List Database (Modify)



- **Select additional field options, if applicable**
- **Two major items**
 - **Show on summary page**
 - **Show in search form**



OK Previous Cancel

Database Field Options

Each field has different additional options, depending on its data type. pick the approvers. Otherwise, these settings are all optional.

Look over the options for each field, and make any changes you want.

Pager Number

Initial value

☐ Display on the same line as the previous field

☐ Use this field as the title of entries

☒ Show this field on the summary page

☐ Show this field in the search form

☐ Use this field as the default grouping

☐ Use this field as a grouping option

OK Previous Cancel



INFORMATION TECHNOLOGY
DIVISION

15

Contact List Database (Modify)



- **Create a second entry in your contact list database**
- **Navigate back to contact list root**
- **Click new entry button**
- **Create an entry**



Contact List edit
a database created by eroom admin on 8 Sep 06

[new entry](#)

Maintain the contact information for all the current membe

Name	Email	Role
Group by (none)		
Jane Doe	jdoe@lbl.gov	Product

[new entry](#) [notification](#) [export](#) [import](#)

OK Add Another Cancel

Contact List
Create Database Entry

Name

Email

Role

Responsibility

Organization

Phone

Cell

Pager



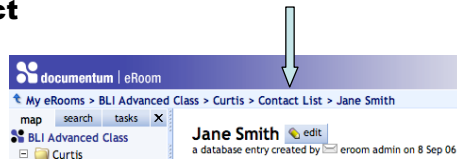
INFORMATION TECHNOLOGY
DIVISION

16

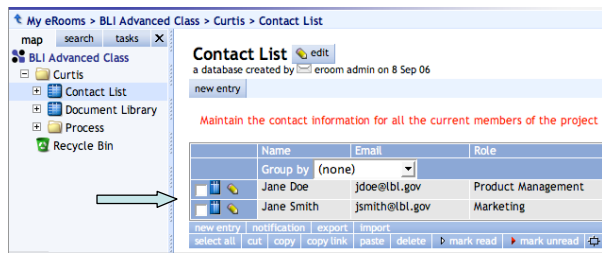
Contact List Database (Modify)



- Navigate back to contact list database root



- View two entries in database



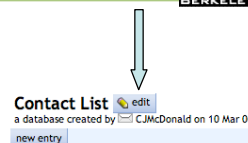
INFORMATION TECHNOLOGY
DIVISION

17

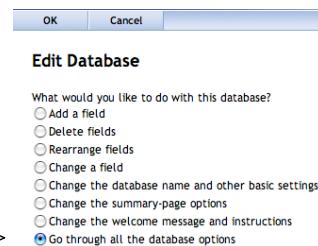
Contact List Database (Modify)



- Select edit button



- The following options are available
- Select go through all database options



INFORMATION TECHNOLOGY
DIVISION

18

Contact List Database (Modify)



- The name and color scheme can be changed here

- Select access control button

Next Cancel

Set Database Name

Pick a name for this database.

☐ This database is a multi-step approval process.

Pick a color scheme for this database

City	Zip
Cambridge	02138

access control change icon custom commands



INFORMATION TECHNOLOGY
DIVISION

19

Contact List Database (Modify)



- Select who can open and edit the database

- Select if it should be Read-only or hidden

- Select the initial owner of records in the database

- Select ok and next

OK Cancel

Access Control

Access Control governs who can open this item and who can edit it. List of people.

The people with rights to this item are:

Open

Edit

This item is:

☐ Read-only (not editable)

☐ Hidden (only shown to members who can open it)

☐ Reserved for editing

An entry created in this database can be edited by:

☐ The member who created it

☐ The member who created it and the database owners

☒ Everyone who can open the database



INFORMATION TECHNOLOGY
DIVISION

20

Contact List Database (Modify)



- Option to add a field shown at top of page
- Click pencil to change name
- Blue arrows to change order
- Red x to delete
- The field can limit the number of characters
- An initial value can be added

Next Previous Add Another Cancel

Database Field Options

Each field has different additional options, depending on its data type. fields, you must enter the choices or pick the approvers. Otherwise, t
Look over the options for each field, and make any changes you want.

Name Plain text

☐ Limit this field to 40 (1-256) characters

Initial value

☐ No word-wrapping



INFORMATION TECHNOLOGY
DIVISION

21

Contact List Database (Modify)



- Entry title
 - The primary name for the entry
- Summary columns
 - Shown in summary view
- Search form
 - Ability to use search tool on this field
- Grouping default
- Grouping options
- Option to have attachments, comments and votes

Database Summary Options

Pick the fields to use for each summary-page function. For notes, see below.

field	entry title	summary columns	search form	grouping default	grouping options
all fields	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
no fields	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Name	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Email	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Role	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Responsibility	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Organization	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Phone	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Cell	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Pager	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
a blank for searching all text fields	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

- ☐ Include space for comments and votes
☐ Include box for attachments



INFORMATION TECHNOLOGY
DIVISION

22

Contact List Database (Modify)



- **The welcome message will appear in the summary screen**

Database Instructions

You can provide a welcome message for the top of the database summary page. If you do

Trebuchet MS 10 B I U A

Maintain the contact information for all the current members of the project team.

- **The special instructions will appear when creating a new entry**

You can also provide any special instructions users will need for adding and editing entries

Trebuchet MS 10 B I U A

Please keep your contact information updated.



INFORMATION TECHNOLOGY
DIVISION

23

Exercise #1



In the 'BLI Advanced Class' eRoom

1. **Inside your folder create a 'document library' database using the default settings**
 1. **Name it 'My Documents'**
2. **Edit the database you just created**
 1. **Delete the status field**
 2. **Add an owner field**
 1. **Name it owner**
 2. **After the title field**
 3. **Data type of member list**
 3. **Allow for searching of title field**
3. **Add a new record**
(short break if we have time)



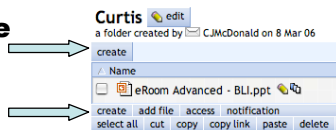
INFORMATION TECHNOLOGY
DIVISION

24

Freeform Database



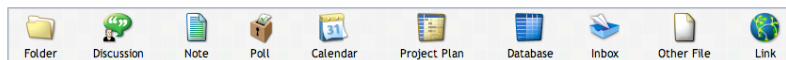
- Go to your folder
- Choose create



- Select database

Create

What type of item would you like to create?



INFORMATION TECHNOLOGY
DIVISION

25

Freeform Database



- Select blank (default option)

Database Type

What kind of database do you want to create?

- ☐ Ask the Expert
- ☐ Contact List
- ☐ Document Library
- ☐ Issues (approval process)
- ☐ Issues Tracking (enterprise)
- ☐ Milestones
- ☐ Research Resources
- ☐ RFP Process (approval process)
- ☐ T&E Processing (approval process)
- ☐ Tasks
- ☐ URL Links
- ☒ (blank)

☐ create an enterprise overview (enterprise databases only)



INFORMATION TECHNOLOGY
DIVISION

26

Freeform Database



- Name the database “my db”

- Enter names of fields needed in database

Next Previous Cancel

Database Fields

The structure of a database is defined by its fields. In a phone-book database: State, Zip, Home Phone, Work Phone, Cell Phone, Fax Number and Email A

Type the names of the fields you would like in this database, one per line.

Name
Notes
Tasks Type
Priority
Date Added
Due Date
Owner
Attachments

Next Previous Cancel

Database Field Types

Choose a data type for each field.

Name Plain text
Notes Plain text
Tasks Type Choice list
Priority Number
Date Added Date
Due Date Date
Owner Member list
Attachments Attachment box



INFORMATION TECHNOLOGY
DIVISION

27

Freeform Database



- Database field options allows for further refinements

- Limiting the size of fields

Notes Plain text

☐ Limit this field to 40 (1-256) characters

Initial value

☐ No word-wrapping

☐ Display on the same line as the previous field

- Specifying items in a choice list

Tasks Type Choice list

Type the choices for this list, one per line

Administrative
Financial
Planning

- Allowing multiple choices

☐ Allow multiple choices

Initial value

☐ No word-wrapping

☐ Display on the same line as the previous field



INFORMATION TECHNOLOGY
DIVISION

28

Freeform Database



- For date fields, select if a due date

- Can set the initial value

- For member list fields can limit list

- Can allow multiple choices

Date Added Date

☐ This is a due date

Initial value

☐ Blank

☒ Date created

☐ Date created plus days

☐ Display on the same line as the previous field

Due Date Date

☒ This is a due date

Initial value

☐ Blank

☒ Date created

☐ Date created plus days

☐ Display on the same line as the previous field

Owner Member list

Which members should be listed?

☒ All members of the eRoom

☐ Only these members:

☒ Allow multiple choices

☐ Display initials, not full names

☒ This is an owner field

Initial value



INFORMATION TECHNOLOGY
DIVISION

29

Freeform Database



- Select search options

- Add any appropriate database instructions

Database Summary Options

Pick the fields to use for each summary-page function. For more, see below.

field	entry title	summary columns	search form	grouping default	grouping options
all fields	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
no fields	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Name	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Notes	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Tasks Type	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Priority	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Date Added	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Due Date	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Owner	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Attachments	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
a blank for searching all text fields	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Database Instructions

You can provide a welcome message for the top of the database summary page.

You can also provide any special instructions users will need for additional fields.



INFORMATION TECHNOLOGY
DIVISION

30

Exercise #2 Freeform Database



In the 'BLI Advanced Class' eRoom

- Inside your folder create a blank database (named tasks) using the following information:

Fields	Data Type	Additional info.
Name	Plain text	n/a
Priority	Choice list	high, medium & low
Due date	Date	this is a due date
Date added	Date	date created
Owner	Member list	allow multiple choices
Attachments	Attachment box	n/a



INFORMATION TECHNOLOGY
DIVISION

31

Exercise #2 Freeform Database



- Add a minimum of three new records to your tasks database
 - Select a combination of high, medium and low priorities
 - Select different owners and multiple owners
 - ~ Make yourself the owner of at least one entry
 - Select different due dates for each item



INFORMATION TECHNOLOGY
DIVISION

32

Exercise #2 Freeform Database



- **Notice:**
 - Trying sorting database by each column
 - Look at tasks tab on left side of page



INFORMATION TECHNOLOGY
DIVISION

33

Database: import/export



- When adding a large amount of data to a database, it will likely be easier to import it from excel
- Begin with an export of existing data

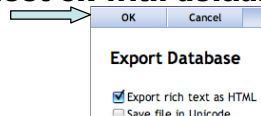
Tasks edit
a database created by eroom admin on 8 Sep 06

new entry

	Name	Priority	Due date
	Create project plan	high	21 Sep 2006
	Approve project plan	medium	28 Sep 2006
	Implement plan	low	29 Sep 2006

new entry notification export import
select all cut copy copy link paste delete mark read mark unread

- Select ok with default settings



INFORMATION TECHNOLOGY
DIVISION

34

Database: import/export



- **Right click on file link and choose to download file**

Export Complete

Click the link below to download the export file.

[Tasks.csv](#)

IE

Mozilla

Safari (ctrl + click)



INFORMATION TECHNOLOGY
DIVISION

35

Database: import/export



- **Open exported file with excel**

	A	B	C	D	E	F
1	Name	Priority	Due date	Due date_1st	Date added	Owner
2	Create project plan	high	9/21/06		9/8/06	Curtis McDonald
3	Approve project plan	medium	9/28/06		9/8/06	Curtis Test
4	Implement plan	low	9/29/06		9/8/06	Curtis McDonald, Curtis Test
5						

- **Create additional entries using existing data format as a guide**
 - **e.g. use 4/4/06 as a date**
 - ~ **Not 04/04/06**
 - ~ **Not March 4, 2006**
 - **e.g. use CJMcDonald as owner**
 - ~ **Not Curtis**
 - ~ **Not McDonald**
 - ~ **LBNL employees listed as EPO, e.g. CJMcDonald**
 - ~ **Outside people will be listed as name**
 - **E.g. 'John Doe'**



INFORMATION TECHNOLOGY
DIVISION

36

Database: import/export



- Add new data to file using copy and paste if possible

	A	B	C	D	E	F
1	Name	Priority	Due date	Due date_1st	Date added	Owner
2	Create project plan	high	9/21/06		9/8/06	Curtis McDonald
3	Approve project plan	medium	9/28/06		9/8/06	Curtis Test
4	Implement plan	low	9/29/06		9/8/06	Curtis McDonald, Curtis Test
5						
6	Hire project staff	medium	10/5/06			Curtis Test
7	Review work	medium	11/5/06			Curtis McDonald
8	Complete project	high	11/15/06			Curtis McDonald, Curtis Test

- When finished, remove existing records.
- Leave field names in file, row 1

	A	B	C	D	E	F
1	Name	Priority	Due date	Due date_1st	Date added	Owner
2	Hire project staff	medium	10/5/06			Curtis Test
3	Review work	medium	11/5/06			Curtis McDonald
4	Complete project	high	11/15/06			Curtis McDonald, Curtis Test
5						

- Save file, leaving in csv format



INFORMATION TECHNOLOGY
DIVISION

37

Database: import/export



- Return to database and select import

Tasks edit

a database created by eroom admin on 8 Sep 06

new entry

	Name	Priority	Due date
	Create project plan	high	21 Sep 2006
	Approve project plan	medium	28 Sep 2006
	Implement plan	low	29 Sep 2006

new entry notification export import
select all cut copy copy link paste delete mark read mark unread

- Choose the file to import and select ok

OK Cancel

Import Database

Pick a comma delimited (.csv) file to import into this database.

Choose File Tasks.csv

☒ Incoming formatted text is HTML



INFORMATION TECHNOLOGY
DIVISION

38

Database: import/export



- **Review prompt for data being uploaded.**
- **Select ok**

OK Cancel

Import Tasks.csv

3 rows of data will be imported into 6 fields (Name, Priority, Due date, Due date_IsDue, Date added, Owner). If that doesn't sound right, click Cancel and check your import file.

The easiest way to figure out the proper data format for your import file is to export some of your existing data, and look at the format of the export file.

- **Data will import and be displayed**

Tasks edit
a database created by eroom admin on 8 Sep 06

[new entry](#)

	Name	Priority	Due date	Date added	Owner
	Create project plan	high	21 Sep 2006	8 Sep 2006	Curtis McDonald
	Approve project plan	medium	28 Sep 2006	8 Sep 2006	Curtis Test
	Implement plan	low	29 Sep 2006	8 Sep 2006	Curtis McDonald, Curtis Test
	Hire project staff	medium	5 Oct 2006		Curtis Test
	Review work	medium	5 Nov 2006		Curtis McDonald
	Complete project	high	15 Nov 2006		Curtis McDonald, Curtis Test

[new entry](#) [notification](#) [export](#) [import](#)
[select all](#) [cut](#) [copy](#) [copy link](#) [paste](#) [delete](#) [mark read](#) [mark unread](#) [refresh](#)



INFORMATION TECHNOLOGY
DIVISION

39

Exercise #3



- **Open your contact list database**
- **Export the database**
- **Create at least 3 new records**
- **Import the records into your database**



INFORMATION TECHNOLOGY
DIVISION

40

Enterprise Database



- **Enterprise databases can pull information from many databases, of identical structure, into an enterprise overview**
- **Useful for 'rolling up' reports to managers**
- **CIS (now ITUS) has used this function to create a standard for all projects**
- **CIS management can review the status of all projects by viewing the one enterprise view instead of viewing each project eRoom separately**
- **Can only be created & maintained by the eRoom administrators**




INFORMATION TECHNOLOGY
DIVISION

41

Resources for information



- <http://www.lbl.gov/ITSD/CIS/citg/eroom/>
 - **eRoom overview**
- <https://eroom2.lbl.gov/eRoomHelp/en/eRoom-7.htm#index.htm>
 - **eRoom help page**
 - **Select  in top right corner of any eRoom page**
- <https://www.lbl.gov/twiki/bin/view/Main/ITFrequentlyAskedQuestions>
 - **WIKI FAQs and Tips & Tricks sections**
- <http://www.lbl.gov/BLI/>
 - **Additional BLI classes**



INFORMATION TECHNOLOGY
DIVISION

42



Questions?



INFORMATION TECHNOLOGY
DIVISION